

## **Master Planning Guidelines for Historic Sites**

### ***What is a Historic Site Master Plan?***

Preserving a historic site or property is an admirable goal. However, to actually achieve that purpose entails more than creating an organization to be “friends” of the property for advocacy meetings, fund-raising events, scheduling voluntary tour guides, and seasonal maintenance activities.

While effective preservation of a historic site does include these activities, it also requires a tool specifically dedicated to making all of those things happen: the Historic Site Master Plan. It is the culmination of all the activities and documentation associated with the overall management of a historic site.

### ***Considerations in developing a Historic Site Master Plan***

A Historic Site Master Plan should be developed as early as possible in the process of determining the future preservation of a property. It should include the ideas, goals, and visions of all the actively interested parties involved in the preservation process while also looking to the future so other appropriate ideas may be incorporated at a later date. Primarily, though, the Historic Site Master Plan should provide the guidance, year-after-year, to use, manage, and protect the property in its historic context. It should be a much-used reference tool that is regularly revised and updated as circumstances warrant, but which ultimately keeps the organization administering the historic property continually on the right course.

Generally, before or concurrent with developing a Historic Site Master Plan certain tasks should be completed.

These would include preliminary/due diligence feasibility and marketing studies, the formation of the administering organization as a legal entity, acquisition of the historic property, formulating preliminary preservation-sensitive ideas regarding the use of the property, and establishing procedures for making decisions. The first of these helps the group understand some of the underlying challenges of owning a historic site, the next two provide the mechanism for control of the property, and the last two help get the rest of the planning process started. In these early stages, the group should also recognize that many decisions are yet to be made and many opinions may need to be equitably heard and considered in order to guard against pre-conceived notions overly influencing the outcome of the plan.

Furthermore, development of a Historic Site Master Plan may require consultation with lawyers, architects, accountants, business consultants, preservation professionals, and

other historic sites' management; this is encouraged when appropriate, such as when in-organization expertise is not available or when an impartial opinion is needed. Consultation may also save time and effort, as often, prior experience will provide answers to the unknown and unfamiliar, without the need to reinvent the wheel.

*A Historic Site Master Plan should include:*

1. **Vision Statement:** this should be a short and concise statement of the purpose and goals of the organization regarding the preservation and use of the historic site (which is not necessarily the overall mission of the organization). An important part of creating the vision statement is recognizing and incorporating within it aspects of why the property is historically important—its historic context—and avoiding objectives that conflict with preservation principles.
2. **Executive Summary:** this should summarize the property's history and importance, why the Historic Site Master plan is being created, goals for the use of the property, information about the administering organization, and other important information as applicable. While the executive summary is at the beginning of the plan document, it should be one of the last things written so that all aspects of the plan contents can be considered before deciding what should be included. The Executive Summary should be engaging, informative, easy to read by the general public, and relatively short—no more than two pages. Excerpts from the Executive Summary and the Vision Statement might also provide text for public relations or educational tools as pamphlets or flyers about the property.
3. **Historical Overview:** this should be a highly detailed history of the site, its historical development, its historic features, buildings and structures, and a chronicle of important people or events associated with the property. If copious amounts of information about the history of the site are available, then a summary history may be more appropriate, with reference to a separate historic overview document. An appropriate way to organize and develop a historic overview is to complete a Historic Property Information Form (HPIF) as part of nominating the property for listing in the National Register of Historic Places. Applying for listing in the National Register should be an objective within the master plan and when achieved, the nomination and announcement should be incorporated in the master plan document as well.
4. **Organization Overview and Goals & Objectives for Use of the Historic Site:** this section should include a detailed history of the administering organization and also explain thoroughly how goals and objectives for the use, care, and management of the historic site were determined and how decisions were made. These goals and objectives should be the logical result of a decision-making process that collected and considered such relevant information as: preliminary ideas regarding potential site usage, identification of historic resources on the site and their preservation needs, the historic context of the site, including association with important events or people, identification of issues beyond the immediate control of the organization and options for addressing these issues, costs of implementing a goal or objective, and priorities. Again, while this section of the Historic Site Master Plan is toward the beginning of the document, its final form may be dependent on information that follows.

5. **Development Plan:** this section should be the primary guidance tool for implementing the goals and objectives for the physical development of the historic site. Initially, the development plan should provide a general and broad perspective of what will be occurring to the property over time. As related individual projects are planned and implemented, they should be incorporated or referenced in the development plan section of the master plan. The development plan should include a site plan identifying historic resources, planned new construction, and other site alterations. It should also include, as they are developed, rehabilitation plans for the historic resources.
6. **Preservation Plan:** this section should be the primary tool for determining the appropriate treatment of the historic resources on the property. A preservation plan characterizes and evaluates historic resources, provides the necessary information to responsibly deal with existing issues and concerns about the resources and plan for their future, guides implementation of recommendations resulting from the plan, and acts as a reference source. Incorporated within the preservation plan should be acknowledgement of the Secretary of the Interior's Standards for the Treatment of Historic Properties and a Maintenance Plan. Associated documents include inventories of historic collections, photo-documentation of the site, Conditions Assessment Reports, Historic Structures Reports, other applicable reports, and archaeological studies. These may be included within the preservation plan or developed separately and incorporated. For related information see: *Preservation Plan Guidelines for Historic Properties, Historic Structure Report Guidelines, Conditions Assessment Report Guidelines for Historic Structures, and Structural Assessment Report Guidelines for Historic Buildings or Structures.*
7. **Use Plan:** this section should be the primary guidance tool for managing the various types of uses that are planned for the historic site. Within the use plan should be information on hours of operation, staffing needs, a general maintenance plan, and other day-to-day operational requirements. It should also outline work plans and task lists for operating the site, assign management responsibilities, and set schedules.
8. **Disaster Plan:** this section should be the primary guidance tool for reacting to an emergency situation involving the historic site, such as fire or natural disaster. Within the disaster plan should be information about emergency response measures, including notification responsibilities, emergency decision-making policies, recovery activity team assignments, and safety procedures. Notification responsibilities, team leader assignments, and other duties should include back-ups and be designated by position within the organization rather than to an individual to ensure continuity as terms and personal involvement fluctuates.
9. **Interpretation Plan:** this section should be the primary guidance tool for determining and managing how the historic aspects of the site will be presented to the public. Within the interpretation plan should be information about how historic collections are displayed and curated, how physical and visual historic resources are explained, and how historical associations, such as events, important people, and the site's historic land uses are presented. Also included should be information about display designs, signage, markers, plaques, and monuments, etc.

10. **Business Plan:** this section should establish how the administering organization professionally manages the site. Within the business plan should be information about the management team and board of directors and their duties and responsibilities in operating the site, including marketing, developing and managing the budget, hiring practices, purchasing procedures, and contracting for services.
11. **Financial Plan:** this section should establish how funding the historic site's operational and developmental needs will be achieved. Within the financial plan should be information about budgets, income, expenses, taxes, accounting and auditing practices, user fees, fund-raising activities, projects costs, etc. The financial plan should be updated on an annual basis.
12. **Other Information:** this would include, as applicable, appendices and reference documents.

### ***Other Considerations***

The guidance provided above is intended to be broad but not inclusive. However, all Historic Site Master Plans should have an introduction, a table-of-contents, and be well organized into logically arranged sections. While the specifics of the contents in each section are flexible, all the information mentioned should be considered for inclusion in some form or another, and if not initially, eventually. Recognize that individual plans may require more or less as circumstances warrant and some information may need to be repeated in more than one section, or frequently referenced as in an appendix. Sometimes it may make sense to combine sections and use subsections. Also, a Historic Site Master Plan does not have to be contained in one volume; in a real sense, each of the sub-plans and reports can be standalone documents, which when combined and cross-referenced become the master plan.

A Historic Site Master Plan is not a static document; it should be regularly updated to stay current with the activities of managing and operating the property and of the administering organization. It is appropriate to revise a master plan—information can and should be added when it becomes available or necessary. Finally, as a Historic Site Master Plan is revised and expanded, archiving earlier versions can be a way of recording the long-term stewardship of the site and add to its history.